

Folio:

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MARCH 1990

THE MAGAZINE FOR MAGAZINE MANAGEMENT

\$6.50

25 years of change



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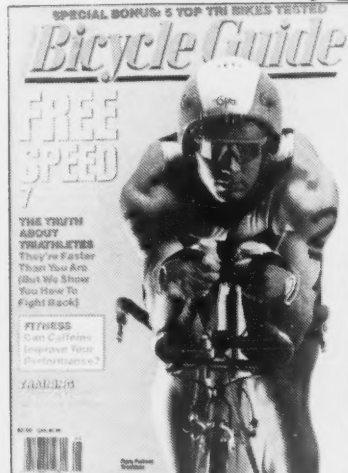
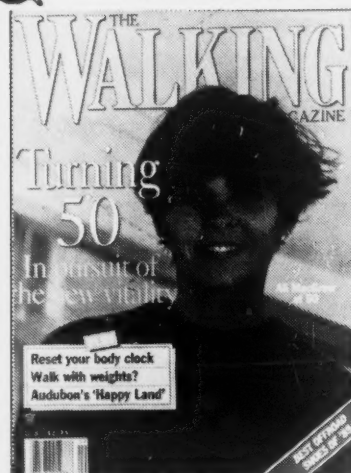
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ABP

The Audit Bureau of Circulations

MPA

UPDATE

Cigarettes battle for check-out space

Armed with big bucks, R.J. Reynolds is pushing aside magazines at top supermarket chains

by Barbara Love

CHICAGO—As if magazines have not had enough problems with single-copy sales, R.J. Reynolds Tobacco Company is spending big bucks to muscle magazines out of prime check-out positions in 1,400 or more supermarkets and drug stores.

One single-copy sales consultant stresses that the move is "just a test and not a program"—but it is "a dangerous test that should concern magazines."

What is dangerous are the high check-out fees Reynolds is paying—about 20 times what magazines have been paying for the same space. For perspective, one need only remember the roar that went up when *First for Women* upped the ante for front-end space by 25 percent just about a year ago.

Calling Reynolds' fee an "outrageous offer," John Harrington, president of the Council for Periodical Distributors Associations, says Reynolds is "willing to pay thousands of dollars up front for space before it makes a penny on a sale. The offer changes the entire scale of the check-out value."

So far, five large chains have accepted Reynolds' offer and made major changes in the front end that have hurt magazines. Three of the chains, in the Chicago area (Jewel, Dominick's and Osco), and 120 Shoprite stores in the Northeast have reracked. The fifth, Winn-Dixie, in Florida, is in the process of reracking 800 stores.

Reports vary as to how serious

the changes are. One vice president of distribution for a major consumer magazine publisher says Winn-Dixie "is rearranging entire check-outs, adding cigarettes by blocking magazines or moving them to lesser positions." A director of single-copy sales, however, says cigarettes will dominate only one rack out of seven in Winn-Dixies. As for Dominick's, FOLIO was told both that every other rack and that every fourth or sixth rack in each store will be dominated by cigarettes.

Why is Reynolds making such a

bold move? One theory is that the tobacco industry, anticipating future ad bans, is boosting check-out presence to protect its flanks.

"The cigarette industry strategy reflects the fact that [the industry] is under extraordinary assault," says Harrington. "There are no bills on the floor of the House or the Senate now prohibiting tobacco advertising in magazines—publishers and cigarette manufacturers fight against that—but people anticipate in the next three to

(CONTINUED ON PAGE 52)

Consumer titles still hot

Mass market titles emerge winners from 1989's scratch-and-claw ad market

by Kevin Sghia

NEW YORK CITY—Now there's good news for those publishers who bemoaned single-copy woes, suffered ad-clutter complaints and faced com-

petitors who did all but roll over and beg for extra ad pages.

Consumer ad revenues were up 10.9 percent last year, showing double-digit growth for the first time since 1984. Moreover, ad pages also broke records for the 166 magazines tracked by Publishers Information Bureau (PIB).

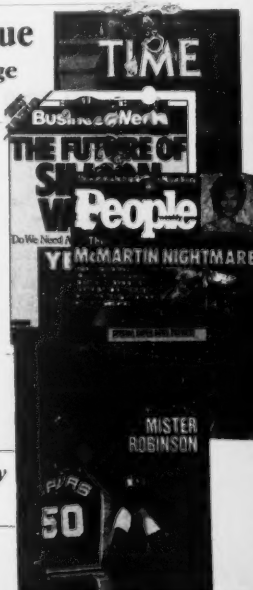
Total ad revenue topped \$6.6 billion—a new high. Adjustments for discounts and rate negotiations, however, bring revenue to about \$5.1 bil-

Top 10 PIB publications ranked by revenue

Magazine	1989 Revenue	Percent change from 1988
<i>Time</i>	\$373,385,017	6.8
<i>Sports Illustrated</i>	336,671,529	4.0
<i>People Weekly</i>	326,203,199	6.8
<i>TV Guide</i>	322,885,623	-3.7
<i>Business Week</i>	260,575,042	14.8
<i>Newsweek</i>	255,918,694	5.8
<i>Fortune</i>	167,284,538	21.7
<i>Forbes</i>	57,696,946	22.5
<i>U.S. News & World Report</i>	152,843,252	19.3
<i>Better Homes and Gardens</i>	152,436,109	-0.2

Source: Publishers Information Bureau

The top titles from Time Inc. Magazine Co. ruled the industry in ad revenues last year, commanding more than \$1.2 billion.



Top ad categories leap in growth

Category	1989 Revenue	Percent change from 1988
Automotive	\$882,890,965	10.35
Toiletries & cosmetics	650,710,759	12.86
Business/consumer services	528,324,524	12.90
Direct response	518,368,753	11.12
Food & food products	435,345,476	15.49
Cigarettes/tobacco	401,485,897	13.34
Apparel	395,046,995	10.56
Travel	374,493,158	16.41
Computers	288,374,673	15.80
Beer, wine and liquor	256,764,679	19.12
Total	\$4,731,805,879	13.04

Source: Publishers Information Bureau

The top 10 categories represent 71 percent of the year's ad revenue of \$6.6 billion.

lion, according to one calculation.

The rosiest magazine categories were business, travel, auto and bridal, along with the Seven Sisters. And, surprisingly, only a few categories, such as investment and gardening, suffered an off year, says Sarah Crowley, associate media director and director of print advertising for Hill, Holliday advertising. Individual books may have struggled, she notes, but most categories did well.

Despite the surge in specialty books, many ad-heavy mass market titles performed better this year than in 1988, says Donald Kummerfeld, president of MPA. Both *Time* and *U.S. News & World Report*, for example, reported big gains, as did most of the Seven Sisters.

Time Inc. Magazine Co. titles topped the revenue charts, with *Time*, *Sports Illustrated* and *People Weekly* together bringing in over \$1 billion in ad revenue for the company. *TV Guide* was fourth, despite losing ground last year, and *Business Week* rounded out the top five.

"Clearly, the Time titles benefited from the MAX-PLAN," says Richard LePere, a publishing management consultant. The plan, which rewards network advertisers with free pages, evidently also helped *Fortune*: The biweekly was seventh in overall revenue and showed almost 22 percent revenue growth.

The real story, however, is that the total revenue for consumer ads has shown strong growth for three years, gaining 5.5 percent in 1987 and 8.6 percent in 1988, says Kum-

merfeld. Advertiser spending on magazines has grown for 14 years straight, he says, but 1985 and 1986 were actually flat when adjusted for inflation.

Automotive advertisers contributed most to the big year, spending nearly \$900 million, despite changes in media strategy that led Nissan and General Motors to pull a combined \$350 million from magazines. The push for pages came largely from auto advertisers selling luxury cars.

Some strong categories turned negative numbers into positives last year. Business/consumer services went up 12.9 percent, and food advertisers rose 15.5 percent after spending less in magazines in 1988 than in 1987. The biggest gainer was beer, wine and liquor, which jumped 19.1 percent from 1988.

False boom in business titles?

On the surface, at least, major business titles finally rebounded from the stock market crash of 1987. *Business Week* outpaced all titles, with 4,914 ad pages, compared to 4,586 in 1988. The magazine also topped other business weeklies with over \$260 million in ad revenue. *Fortune*, up 16.6 percent in pages, showed the biggest gain of any business title since the stock market crash, with an increase of over 700 pages.

Forbes had 12.9 percent page growth, and its revenue climbed 22.5 percent, to over \$157 million. *Entrepreneur* also showed the largest percentage gains.

Crowley, however, calls the business-book growth "a farce. Free pages

are a common practice for any advertiser that has committed to those titles. I have not noticed this degree of free pages in any other category."

Only a handful of business magazines posted losing numbers, most notably the struggling *Manhattan, Inc.* It was down 15.9 percent in revenue, dropping from \$8.2 million to \$6.9 million. *High Technology Business* had the worst numbers of any PIB title: down 50.5 percent in revenue and 53.5 percent in pages.

Moreover, the leading investment magazines declined. *Money*, slightly off in revenue and down 7 percent in pages, didn't appear to benefit from the MAX-PLAN. *Changing Times* fell off 8.5 percent in pages and 4.7 percent in revenue. "These books never made it back after the stock market crash," says Crowley.

But travel titles had a strong year, thanks in part to a 16.4 percent increase in spending by travel, hotel and resort advertisers. "Travel has been a booming market the past five or six years," says LePere.

Conde Nast Traveler, whose forthright editorial sent some offended advertisers packing, had gains of 78 percent in revenue and 52.7 percent in pages. "The fact that they shoot straight from the hip is the reason advertisers want to be in the book," says Crowley. *Travel & Leisure*, the category leader in revenue, showed a healthy 19 percent growth. Also strong were *European Travel & Life* and *Endless Vacation*.

Meanwhile, the automotive category was strong from top to bottom, with two books, *Car and Driver* and *Motor Trend*, showing over 20 percent revenue gains. And both *Bride's* and *Modern Bride* walked off with double-digit gains in pages and revenue. With the exception of *Better Homes and Gardens*, moreover, the Seven Sisters were all up at least 9 percent in revenue—no doubt due to extensive marketing "partnerships" among packaged-goods advertisers.

On the losing side were such major gardening magazines as *Flower & Garden* and *Organic Gardening*. The former slipped in revenue from nearly \$2.1 million to \$1.9 million, while losing over 14 percent of its ad pages from 1988. *Organic Gardening* was down 18 percent in pages and nearly 1 percent in revenue. □

25 years of change

What's been happening in the consumer magazine industry? Emerging trends may come as a surprise

BY JAMES B. KOBAK

Pity the poor consumer magazine industry. Since 1963 it has been battered by television and beset by cable. It has suffered distribution by a backward Postal Service, tried desperately to get its products distributed through an antiquated single-copy distribution system, coped with higher paper and postal rates, and tried to reach an increasingly illiterate population.

Nonetheless, during the past 25 years the consumer magazine industry has—

- Put out three times as many magazine titles as there were in 1963—1,275 versus 445.
- Published twice as many issues—15,500 versus 7,400.
- Had about twice the circulation—540 million versus 270 million.
- Increased by 50 percent the total number of copies over 25 years ago—11.4 billion versus 7.7 billion.

To put it another way, the average household got 5.9 different magazines in 1988 as compared to only 4.9 in 1963. That means that 125 copies of magazines went through each door in 1988.

Keep in mind that these figures are very understated because I tried to limit them to "true" magazines. For instance, I omitted comic books, entertainment guides and several other types of publications. And, since this analysis was taken from Standard Rate & Data, magazines that do not take advertising were not included. This means that the likes of *Guideposts*, *Highlights for Children* and *Country Woman* were not counted.

This information, and that which

James B. Kobak is head of James B. Kobak & Company, a consulting firm specializing in magazine, book and other communications companies.

follows, was developed because I have been at it again—trying to figure out what has been going on in the consumer magazine business by studying *my* favorite magazine—Standard Rate & Data. I have analyzed issues for 1988, 1981, 1973 and 1963 to try to determine what has happened in the industry as a whole and in various fields. Please realize that this does not represent all the activity, because there have been comings and goings in the intervening years. Do not try to read any significance into those particular years—I just happened to have the necessary data in usable form. There are inherent weaknesses in using SRDS, which are explained elsewhere, but the basic trends come through despite them.

I. Changing concepts

Those warnings out of the way, let's take a look at some concepts that emerged from my studies. But first, some definitions that will be useful as you read this analysis:

- **Title:** A given magazine, such as *Good Housekeeping* or *Life*.
- **Issue:** The number of different issues put out by all publishers. For example, *Time* has 52 issues per year.
- **Circulation:** The total circulation of one issue of a magazine.
- **Copies:** The total number of copies of all magazines that were circulated—or, the number of issues times circulation.

1. Advertising is not important in the magazine industry

The conventional way of viewing the consumer magazine industry is obtained by developing data on advertising pages and dollars per year, share of the media pie, etc. This is fine—and it is also very easy because all you

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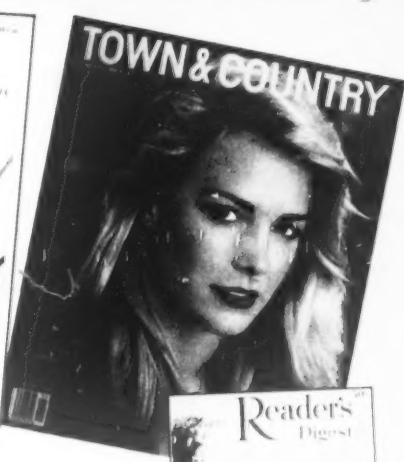
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Readers Digest



TOWN & COUNTRY



NATIONAL GEOGRAPHIC



YANKEE



THE SATURDAY EVENING POST



Have you kept up with changes in the consumer magazine industry?

- Advertising is the most important aspect of a magazine. ☐ T ☐ F
- Magazines are a growth industry. ☐ T ☐ F
- General interest magazines are growing faster than special interest. ☐ T ☐ F
- Men read more magazines than women. ☐ T ☐ F
- Most magazines have a very short life cycle. ☐ T ☐ F
- There is no magazine business. ☐ T ☐ F
- Audited circulation is gaining in popularity. ☐ T ☐ F
- Magazines published by not-for-profit organizations are a minor part of the field. ☐ T ☐ F
- An increasing number of new magazines are being launched. ☐ T ☐ F
- The most important factor in the success of a magazine is the ability of the publisher. ☐ T ☐ F

1. F, 2. T, 3. T, 4. T, 5. T, 6. T, 7. T, 8. F, 9. T, 10. F

GRIT



THE NEW YORKER



LIFE



have to do is call Publishers Information Bureau (PIB), Magazine Publishers of America (MPA), *Ad Age*, etc. and ask about pages and dollars spent. And this information is certainly meaningful and useful.

I, however, come from that small (tiny) coterie of people who believe that if the public doesn't buy (and therefore presumably read) magazines, there won't be any advertising—or anything else for that matter.

2. General interest magazines are growing faster than special interest magazines

Sure there was a drop-off of general interest magazines after 1963 because of the death of *Life*, *Look* and *The Saturday Evening Post*. And certainly more special interest magazines now exist—about three times as many now as in 1963 (1,200 versus 400). But there are 50 percent more general interest titles (60 versus 40), more circulation today than in 1963 (136 million versus 115 million) and even more total copies distributed.

The general interest field exemplifies the ups and downs of the magazine industry. Of the 22 magazines listed in 1963, 10 are still here—*The Atlantic*, *Ebony*, *Grit*, *National Geographic*, *The New Yorker*, *Reader's Digest*, *Saturday Evening Post* (at a very reduced level), *Natural History*,

Yankee and *Town & Country*. You may recall others that we used to know—*National Observer*, *New Times*, *Realities*, *Book Digest*, *Coronet*, *Quest*. Some 22 that were listed earlier no longer exist.

New ones building the general category since are *National Enquirer*, *Star*, *Smithsonian*, *Mother Earth News* and a number of others.

The average circulation per magazine has declined from 1.9 million to 1.2 million, and the average issues from 22.5 to 14.2.

The newspaper-distributed magazines, which are part of the general category, have also gone through major changes. The major players now are *Parade* and *USA Weekend*—with a few individual papers in addition. Back in 1963, many more papers listed their own Sunday magazines—including some old friends like *The New York Herald Tribune* and *The New York Mirror*.

3. Men read more magazines than women

It never used to be that way. In 1963 there was twice as much circulation for women (63 million) as for men (33 million), and about twice the number of copies (735 million versus 390 million). But all that has changed. There are now many more magazines aimed primarily at men

(395 versus 155); four times the number of issues (5,000 versus 1,300); and more copies (1.4 billion versus 1.2 billion).

Nonetheless, the women's magazines still have more circulation (106 million versus 89 million).

How did all this happen—and how could conventional wisdom have been so wrong?

I think it's because women have fewer, but larger, magazines—although they are becoming more fragmented as the women's movement breaks down some of the traditional interests. (More of that later.) Men's magazines are in a number of different fields—and the recent large growth in Fishing & Hunting and Sports magazines has multiplied the number of magazines as well as every other factor.

4. The industry is growing rapidly, but is in a constant state of ferment

Just because there has been overall growth of 15 million in circulation and 400 million in total copies in each of the last few years, don't get the idea that the magazine field is running along smoothly like a well-oiled Mazda. Sure there is a base of profitable magazines that seems to go on forever. Of the 540 magazines with over 100,000 circulation listed in 1988, 165 were started before 1950—and 37 before 1900. But of the 1,275 magazines listed in 1988, only 575 had been listed in any of the three preceding periods I examined. I counted 785 that are gone now. And if you were to add the comings and goings of magazines in the in-between years, the death toll would be even higher.

I looked at each of the last eight years of SRDS and found that a total of 1,200 new magazines were listed in the categories I included, but only 350 are still here. This means that some 150 new magazines are listed each year and about 100 are deleted. The net gain is 50, but the churn is enormous. Why?

The answer has to do with the fact that magazines exist because people have interests, that those interests change, and that every magazine has a life cycle. And it points out, once again, that any publisher has to be constantly starting new properties just to remain where he is. Some of



The general interest field exemplifies the ups and downs of the industry—witness the reincarnations of *Life* and *The Saturday Evening Post*.

you are probably wondering if the major publishers with their stables of many titles are just as vulnerable as anyone else to the collapse of some of their fields. You bet!

5. There is no magazine business

Every magazine is in a different business. Every magazine appeals to different readers and different advertisers. If you hadn't noticed, *Ms.* is quite different from *Playboy*—and neither is very much like *Quilter's World* or *Hot Rod*.

These differences account for some of the changes in the nature of the "average" magazine. In 1963, the "average" magazine published 16.6 issues. That figure has gradually dropped until it was 12.2 in 1988. Publishers have realized that neither the calendar nor great frequency are necessarily important for readers. In fact, some have found that readers really have very little knowledge of the frequency of most magazines. If you were getting more than 125 copies a year, would you?

While there has been growth in the total number of magazines, the greatest growth has taken place in the smaller circulation magazines. In 1963, the average circulation was 612,000. It declined to 422,000 in 1988. Most of this is attributable to the large number of new, special interest magazines. As would be expected given the smaller average circulation and fewer issues, the average copies per magazine also declined to nine million from about double that.

Interestingly, while there certainly have been a greater number of new titles among the small special interest magazines, there has been good growth at every level of circulation, as follows:

Circulation	Number of magazines	
	1988	1963
Up to 100,000	661	215
100,000-499,999	414	142
500,000-1,000,000	100	38
Over 1,000,000	100	50

6. More magazines have audited circulations

A trend toward an increased number of magazines with audited circulations is evident.

	Magazines audited	
	1988	1963
ABC	482	190
BPA	85	8
VAC	8	2
Total audited	575	200
Sworn	553	223
Guaranteed, distributed or printed	147	3
Total	1,275	426

The words used for some types of circulation have not been the same in each period. Today "guaranteed" usually refers to magazines that have either just gone into business, or are about to. "Distributed" refers to some controlled circulation publications. "Printed" covers special interest publications that are adjuncts to some of the major magazines, and are sold only on the newsstand. And whenever a publisher uses the word "Sworn," we all wonder how much he is lying—but, of course, association and medical magazines are not suspect.

As you would expect, the incidence of being audited increased with the amount of circulation, but more and more smaller magazines are also being audited. The figures above and below 100,000 circulation are as follows:

Circulation	1988	1963
Less than 100,000		
Audited	190	41
Sworn	372	174
Other	99	n/a
Total	661	215
Over 100,000		
Audited	385	159
Sworn	181	49
Other	48	3
Total	614	211

In 1988, only 27 of the 200 magazines with over 500,000 circulation were not audited.

7. Not-for-profit magazines increase

It is not always possible to be sure which magazines are published by not-for-profit organizations. My best estimate is that in 1988, there were 148 not-for-profit magazines; in

1963, there were 100. Some of these magazines are among the largest: the two AARP publications, *National Geographic*, the Civic and Fraternal magazines, *Ducks Unlimited*, *Smithsonian*, *Reader's Digest*, some religious magazines, some AAA publications, CTW Magazines, *Boys' Life* and *Scouting*.

The total circulation in 1988 of the not-for-profits was 78 million, close to 15 percent of the total for all consumer magazines.

8. There are more and more new magazines

Because the figures do not cover every year, they are not precise—but they do give an indication of the increased activity in new magazine start-ups. For each of the four years studied, the number of magazines started during the 10-year period before the date was as follows: In the 10-year period prior to 1988, 494 magazines were started; in the 10 years prior to 1981, 418 magazines were started; for the 1974 period, 239 magazines were started; and for the 1963 period, 113 magazines were started.

Again, these numbers give only an indication. At some point in the future, I plan to make a more exact study.

9. The field served takes center stage

I said before that magazines exist because readers have interests. But it isn't until you study a magazine's history over a number of years that you realize that the field served is the most important factor in a magazine's success. If you can find a field that is about to take off, you can put out a perfectly terrible magazine and still make money. If you don't believe me, consider some of the computer magazines in the early eighties.

By the same token you can put out wonderful magazines in a field where no one wants them—and there will be no way to be profitable. Consider *Science 85*, *Science Digest*, *Discover*, etc., which hitched their stars to what has apparently turned out to be the nonexistent general science field.

But even within a field, changes can take place that will kill a magazine. Consider the women's field in the past few years. Or the present-



Major new fields have sprung up. In addition to the computer magazine explosion, other burgeoning areas include titles for senior citizens and city and regional magazines.

day photography field. If you don't read the signs that tell of a changing field, a successful magazine can very quickly become a disaster.

Review the various fields in which magazines have been published, and you can track the history of the country and its trends as well as any sociologist—and maybe even better and quicker.

II. Changing fields

Having perused these truisms of magazine publishing today, we can take a look at the following data about various publishing fields with a more educated eye.

1. Some major new fields have developed

No surprise here. We all know that magazines in the Senior Citizen, Computer and Metropolitan/regional/state fields have only recently come into being. In 1963, there just weren't any magazines for senior citizens—in 1988, there were 17. Circulation is over 38 million—primarily because of the two AARP magazines, which have over 15 million each. There are also a number of new magazines in the senior citizen area, but the jury is still out about whether us old folks want our own magazines.

The computer field, of course, has exploded since the early 1980s. In 1988, some 42 magazines were listed with a total circulation of some 4.5 million. The comings and goings in this field have been legion. Of the magazines listed, 40 of them appeared first in 1988. Most of the magazines now are system specific. The larger ones include *Byte*, *PC*, *PC World*, *Personal Computing*, and *Fam-*

ily & Home Office Computer.

If you have the feeling that a lot of city magazines have been launched, you are right—some 129 were listed in 1988. I think it was after *New York* started in 1968 that the trend got going. There had been a handful before that—*Atlanta*, *Chicago*, *San Diego*, etc.—but they weren't listed in SRDS. But all is not gravy in this area. The small universe for circulation makes it difficult for any of them to make good profits.

The increase in regionals in all categories accounts for a quarter of the increase in titles of all kinds.

2. Some fields have shown very rapid growth

These include Home Service, Epicurean, Fashion, Fishing & Hunting, Sports, Music, Travel, Fitness & Health, Art & Antiques, Crafts, Hobbies & Games, Business, Airline In-flight and TV & Radio. Let's take a look at each.

• **Home service:** This has been a very active area. There are now 83 magazines compared to just nine in 1963. Circulation has increased from 13 million to 40 million.

In 1963, there were just a handful of major magazines—*Better Homes and Gardens*, *American Home*, *House & Garden*, *Sunset*, *House Beautiful* and a few others. Later they were joined by *Southern Living*, *Architectural Digest*, *Metropolitan Home* (nee *Apartment Life*), and a host of others.

A number of regional home and garden magazines have been tried—not all successfully. It appears that their success depends on the strength or weakness of the city magazine in the area.

Some of the major magazines

have stepped up the frequency of their special interest publications (*Better Homes and Gardens' Traditional Home* and others) so that they qualify for this list (quarterly or more frequency). Consequently, both the average number of issues and circulation per title have been declining.

• **Epicurean:** Once the sole domain of *Gourmet*, this field now has 15 entries. A number of others have attacked the field, but just a handful have lasted any length of time. These include *Bon Appetit*, *Food & Wine* and *Weight Watchers*.

• **Fashion:** In 1963 there were three magazines in this field with a total circulation of 1.5 million. The field began to grow around 1980 and was dominated by *Vogue*, *Glamour*, *Mademoiselle* and *Harper's Bazaar* until *Elle* appeared. Circulation now totals about seven million, and other new entries are being planned.

• **Fishing & Hunting:** In 1963, there were some 21 magazines with five million circulation. In 1988, 67 magazines were listed—with a combined circulation of 17 million. A number of these magazines have regional editions, but are included only once in my figures.

The major magazines, with over a million circulation, were all started in the last century. They include *Field & Stream*, *Outdoor Life* and the National Rifle Association magazines. Other notables now are *Bassmaster*, *Ducks Unlimited*, *Guns & Ammo* and *Sports Afield* (which also was started in the 1890s and had over a million circulation, but consciously reduced that several years ago).

The many other magazines are geographically oriented or devoted to specific animals.

• **Sports:** This is one of the fastest growing areas in terms of number of magazines, having increased from 34 titles with two million circulation in 1963, to 100 with 24 million in 1988.

However, it is also one of the most treacherous for publishers—perhaps because people want to be involved in, but not read about, sports. Seventy-one titles are now gone. The most popular areas for start-ups have been bicycling, with 16; golf, with 19; tennis, with 10; and skiing, with 12. But the total of the older magazines that are still around in these four areas is 11, while 11

titles have passed away.

There are only a handful of major magazines—*Golf Digest*, *Golf*, *Sport*, *Tennis*, *World Tennis*, *Ski*, *Skiing*, *Runners World*. But, of course, *Sports Illustrated* and *Sporting News* are listed under the Newsweeklies.

Again, from a sociological standpoint, if you want a list of all the sports that ever existed, just take a look at these four periods: There are 35 different sports, including gliding, disc sports and rafting.

- **Music:** This is another field where there have been many entries. Starting in 1963 with 15 titles and one million circulation, the category had 41 titles with six million circulation by 1988. Some 24 titles have gone.

Rolling Stone, with over a million circulation, is the outstanding magazine here. There are a number with a few hundred thousand circulation—*Stereo Review*, *Country Music*, *Rockbill* and *Sheet Music*. *High Fidelity*, one of the original powers, recently closed down.

- **Travel:** This is another category that has been growing rapidly. It now has 59 listings with a circulation of 30 million, compared to 22 titles and a circulation of 4.5 million in 1963.

It is also a field of big numbers: Eight magazines have over a million circulation, and 13 have between 500,000 and a million. A great many of the magazines are connected with automobile associations, hotel chains and oil or other companies. But there are also *Travel & Leisure*, *Travel/Holiday*, *Endless Vacations*, *National Geographic Traveler* and *Conde Nast Traveler* with good circulations. The field was depressed during the 1981 period because of the oil embargo.

- **Fitness and Health:** It should be no surprise that this has been a real growth area—particularly in recent years. There were nine magazines in 1963 with just 600,000 in circulation. Today there are 26 magazines with 10 million in circulation.

Prevention, *Health* and *American Health* led the parade with more than a million circulation each, but there are also *Muscle & Fitness* and *Walking* at somewhat less.

A new phenomenon involves magazines devoted to specific diseases,

such as cancer and arthritis. The future success of these is not yet known.

- **Art & Antiques:** This is a field of small circulation magazines—only four have more than 100,000 circulation. Most magazines are offered for specific areas of the field. There were seven magazines in 1963, with a total circulation of just 200,000; in 1988, it was 23 titles and 1.4 million circulation.

- **Crafts, Hobbies and Games:** Here there are lots of little magazines covering every conceivable type of craft and hobby—including *Tropical Fish*, *Teddy Bear & Friends* and *Live Steam*, plus a few with several hundred thousand circulation such as *Games*, *Crafts Magazine*, *Crafts 'n Things* and *Fine Woodworking*. The field has grown from 13 magazines with 800,000 circulation in 1963 to 61 magazines and six million circulation in 1988.

- **Business:** This field grew from 17 magazines with 1.8 million circulation in 1963 to 33 titles and 8.2 million circulation in 1988. The field

“If you don’t read the signs that tell of a changing field, a successful title can become a disaster.”



was dominated for many years by *Business Week*, *Fortune*, *Forbes* and *Nation's Business*. In recent years these titles have been joined by *Inc.*, *Venture*, *Savvy*, *Black Enterprise*, *Entrepreneur* and some others. The average circulation has been declining as new, smaller magazines have entered the field.

- **Airline Inflight and Railroad Onboard:** There were just 11 magazines with 1.4 million in circulation in 1963—and, believe it or not—10 were for railroads and just one for an airline, Pan Am. Recently, of course, there has only been *Amtrak*. In 1988 there were 30 magazines with 4.1 million in circulation.

These magazines are dependent on which airlines are in business; the recent spate of mergers has forced many changes in titles.

- **TV & Radio:** In 1963 there were just three magazines with 1.2 million circulation. This field was primarily concerned with ham radio and other hobby activities until the VCR age arrived. Now there are 24 magazines with four million circulation covering these areas as well as other home entertainment fields.

The largest magazine is *Take One*, which is sent controlled to almost a million people. There also are *Satellite Orbit* and *Satellite TV Week* covering the satellite area at about 400,000 circulation, and *Video*, *Home Video Review* and *Video Review* at about the same circulation. The venerable *Radio Electronics* has over 200,000 circulation.

3. Some fields have been growing slowly

There are four categories here—News, Brides, Boating and Science.

- **News:** This category contains some magazines that you might not think of as news, such as *TV Guide*, *Sports Illustrated*, *Sporting News*, *New York* and the *Village Voice*. These magazines want to be listed in this category because it's what the big advertisers look at.

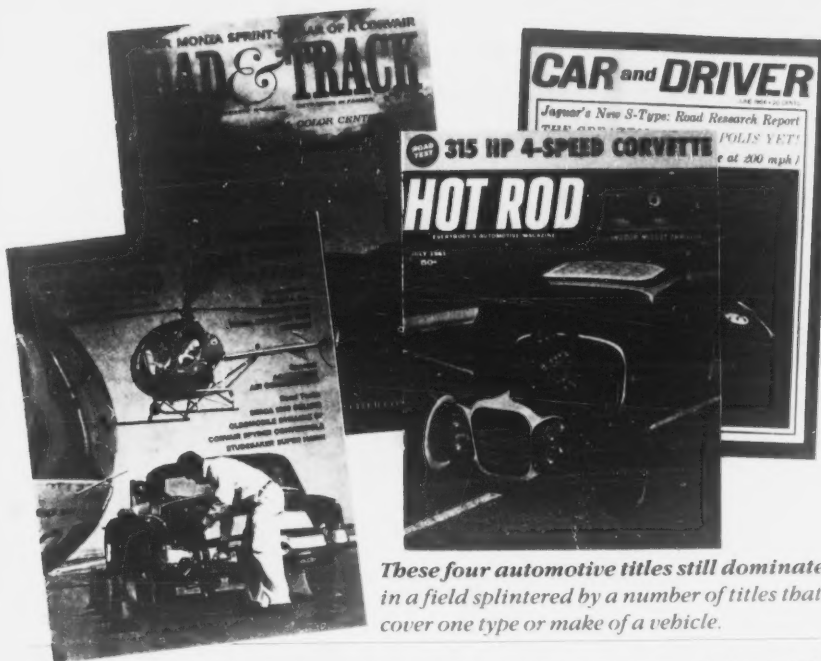
There were eight magazines in 1963 with 15.5 million circulation. A big jump came about in 1973 because of large circulation increases for *TV Guide*, and the total circulation increased to 34 million.

The category has been quite stable since then with just 13 magazines in 1988 and 38 million circulation. It is, of course, dominated by some very large circulation magazines. In addition to *TV Guide*, there are *Time*, *Newsweek*, *U.S. News*, *People* and *Sports Illustrated*. *People* and *Us*, started in the seventies, were the last major ones.

- **Brides:** This is a small but lucrative field. There were four magazines in both 1963 and 1988, with circulation almost doubling to 900,000. The market has been left to *Bride's* and *Modern Bride*—but you should see their advertising figures.

- **Boating:** There has been an increase in this category in both magazines and circulation since 1963—from nine and 600,000 to 37 and 2.5 million. This is a relatively stable field with only 14 magazines no longer published.

Despite the huge size of the



These four automotive titles still dominate in a field splintered by a number of titles that cover one type or make of a vehicle.

boating population, the magazines have always had relatively small circulations. None has more than 200,000, and only a handful have over 100,000. There are a number of regionals, and of course there is the division between power and sail boats.

Yachting and Motor Boating & Sailing are the venerable titles started early in the century. They have been joined by *Boating*, *Boating Digest*, *Cruising World*, *Sail*, *Southern Boating*, *Soundings*, *Wooden Boat* and, most recently, the controlled circulation *Power & Motor-yacht*.

- **Science:** Magazines about science and allied subjects have variously been carried in categories called *Mechanical & Science*, *Nature & Ecology*, *Astronomy and Science/Technology*. I have merged them all here.

In 1963 there were just 11 magazines with a total of 4.6 million in circulation. By 1988, there were 23 magazines with more than 10 million circulation.

While the science field as a whole has grown, it consists of magazines that are addressed to specific areas, plus the three old titles—*Science*, *Popular Mechanics* and *Home Mechanics* (*Mechanix Illustrated*), all with more than a million circulation. The periods I used do not show the bulge when *Science* 85, *Discover* and *Science Digest* were all fighting it out for circulation as gen-

eral science magazines. All that is left now is *Discover* at about a million. *Scientific American* and *Omni* also have strong circulations.

4. A field that is changing, but not growing

Which field this is should surprise no one. There are more magazines in the Women's field in 1988 than ever before—57 compared to just 17 in 1963. But the peak circulation, 59 million, was in 1973—with 27 magazines. In 1988, circulation was 57 million with many more titles.

We all know about the changes in this category caused by the women's movement, but the explosion in the number of titles is startling. First there was a big increase in total circulation, then a leveling out indicating that the new magazines were taking readers from the older ones. A number of the older magazines have reduced their circulations to maintain their profit margins. The average number of issues and the average circulation have also been declining.

Some titles have come and gone—*American Girl*, *Girl Talk*, *Pag-eant* and *Ingenue*. And, of course, there has been a rash of new ones including *Essence*, *Lady's Circle*, *Ms.*, *New Woman*, *Playgirl*, *Working Mother*, *Self*, *Soap Opera Digest*, *W.*, *Working Woman*, *Taxi* and *Victoria*. *Mirabella*, *First for Women*, *Lear's* and *Woman's World* joined the category more recently.

5. Fields that grew for a time, but are now declining

Included here are *Babies*, *Automotive* and *Motorcycle*, *Horses* and *Photography*.

- **Babies:** From eight magazines and four million circulation in 1963, this field grew to a circulation of seven million in 1973. By 1988, it had dropped back to six magazines and four million circulation.

- **Automotive and Motorcycle:** This field has come a long way since Bob Petersen launched *Hot Rod* in 1953. In 1963 there were 21 magazines with 3.4 million circulation. This grew to 52 magazines with 7.7 million circulation in 1973, but declined in 1981—probably because of the oil embargo. The number of magazines is now 53 and the circulation is 9.9 million.

The major magazines are still operated by Petersen's organization and Diamondis. *Motor Trend*, *Hot Rod*, *Road & Track* and *Car and Driver* are the largest in the automotive area and *Cycle*, *Cycle World*, *Easyrider* and *Motorcyclist* dominate in the motorcycle area. The field is splintered by a number of magazines that relate to only one type or make of vehicle.

- **Horses:** The field jumped from 11 titles and 300,000 circulation to 24 titles with 1.3 million circulation. There have been more magazines since, but no more circulation.

There are no major magazines here, although a few have circulations over 100,000. Most are devoted to specific breeds of horse or other specific interests.

- **Photography:** This field grew from four magazines with 900,000 circulation in 1963 to 10 magazines with 2.5 million circulation in 1981. Since then the field has declined, primarily because of the development of virtually foolproof automatic cameras and darkroom equipment. In 1988 there were still 10 magazines with 2.3 million circulation, but the recent demise of *Modern Photography* reduced that considerably. There are now just three major magazines, *Popular Photography*, *Photographic* and *American Photographer*.

6. Some fields have been flat

There are a number of fields that have relatively few titles, low circulation, and little opportunity for fur-

ther growth. Profits are generally hard to obtain. These include gardening, Trailers & RVs, Dressmaking, Aviation, Dogs and Pets and Political.

- **Gardening:** Starting with just eight titles and 1.7 million circulation in 1963, this field went to 10 titles with 2.3 million circulation in 1988. This has never been a very exciting field, primarily because of different growing conditions and different advertisers in various parts of the country. Profits are difficult to maintain. Just four of the older magazines still exist—*Horticulture*, *American Rose*, *Flower & Garden* and *Organic Gardening*—and I wouldn't dare ask how they are doing.

- **Trailers & RVs:** This field had barely started in 1963 with just two magazines. It grew rapidly until 1973, when there were nine magazines with 1.1 million circulation. The oil embargo caused several leaders, like *Woodall's Trailer Travel*, to drop out. The field is now dominated by TL Enterprises with its *Good Sam's Hi-Way Herald* and *Trailer Life*.

- **Dressmaking:** Starting with just one title in 1963, this field grew to have circulation of 2.1 million in 1981. Since, it has declined to 1.5 million. Only *Vogue Patterns* and *McCall's Carefree Fashions* have lasted.

- **Aviation:** This field grew rapidly from 1963 to 1973—from four to 11 magazines, and from 500,000 to 1.3 million circulation. Since then it has been flat and now has 14 titles with even lower circulation.

Except for *Flying* and *AOPA Pilot*, both of which were launched in that famous year in aviation, 1927, the magazines are small, serving specific interests or geographic areas. The decline of general aviation has affected the category.

- **Dogs and Pets:** There have been about 10 magazines during all the periods studied—but not the same ones. Eight have passed away. Circulation has grown from 400,000 to 800,000. Cats are the favorites, with dogs and birds second.

- **Political:** There were 10 titles in 1963 and 18 now. Circulation has increased from 900,000 to 1.3 million, with the major growth taking place before 1981. This is a difficult field for publishers—circulations are low, and most of the products are subsidized.

7. Some fields have declined

Included here are the following: Men, Youth & Children, Romance & Fan, Religious and Civic & Fraternal.

- **Men:** Although the total number of magazines in all the various categories catering to men has increased greatly, those appealing in a general way have suffered a major decline. From 32 titles with 15 million circulation in 1963 there has been a decline to 14 titles and just 9.6 million circulation in 1988. Fully 28 have failed during the period.

The nature of the magazines has changed too. The days of *Dude*, *Gent*, *Argosy*, *Saga*, the legendary *Police Gazette* (which doesn't seem very exciting now) and the others were replaced by *Playboy*, *Penthouse* and their ilk. We are now seeing a few serious titles such as *Fathers*, *Men's Health*, *M* and *Gung-Ho* (if that is serious).

- **Youth and Children:** The difficulty of reaching kids has always been apparent. There were 17 magazines with 11.6 million circulation in 1963. Today there are 34 titles with just 9.2 million circulation. Twenty-nine magazines have passed away.

The only real magazines left from 1963 are *Boys' Life*, the *Scholastic* papers, and the *Jack & Jill*, *Humpty Dumpty* group. *Sesame Street* and *1,2,3 Contact* are the only major ones added.

The nature of the magazines has changed too. There used to be *Cath-*

olic Miss and *Youth for Christ*. Today we have *Teen Beat*, *Splice* and *High School Sports*. But who knows if they will last?

- **Romance & Fan:** This is an interesting category. Back in 1963 there were just 11 magazines with 6.3 million circulation. By 1973 the category had exploded to 24 titles with 13.4 million circulation. And we are now down to just eight magazines with only 3.4 million circulation. The category seems close to expiring. There were no new magazines listed in 1988, and I am not sure exactly what still exists. I suppose you could argue that *People*, *Us*, *Star*, etc., have replaced these, but I don't think they are really the same thing.

- **Religious:** Although the number of titles has not decreased too much here—from 34 to 26 titles—to a great extent they are different ones. Some 33 magazines have gone. Total circulation, which was 13.4 million in 1963, is down to 6.2 million. This drop, of course, reflects the decline in the old-line organized religions that took place during this period.

- **Civic & Fraternal:** In this category, the number of titles has declined from 31 to 21, and the total circulation is down from 11.3 million to 11.1 million. This reflects the gradual erosion of membership in these organizations—but there are still five titles with over a million circulation. □

Using Standard Rate & Data Service

Anyone who has worked with SRDS as a statistical tool (rather than what it is designed for, to help advertisers and agencies) is aware of its limitations and some of the difficulties. To point out a few:

Magazines that do not take advertising, or are dependent only to a limited extent on advertising, are not listed. *Highlights for Children* and *Country Woman*, among others, are not included. A number of primarily newsstand-sold magazines are also omitted.

In some cases, it takes some time for a magazine to meet the requirements of SRDS, or the magazine may not know it exists. For this reason a number of relatively new magazines may not be listed.

Some magazines are not faithful about sending in their circulation material and are de-listed, even though they may still exist.

Magazines are sometimes changed from one interest category to another as time goes on. Often this is because of a change in the magazine. In other cases it seems somewhat arbitrary. You get the feeling, too, that there are certain categories where magazines think they will get better advertising acceptance—*Sports Illustrated* and *Sporting News* under Newsweeklies rather than Sports, for example. A few categories seem to have no real reason to exist—*Snowmobiling*, for instance. I have taken liberties in moving some titles around to where I think they belong.